

REQUEST AN EXONERATION

Effective Date

08/16/2005

Overview

An Exoneration is a process by which the locality reduces, either fully or partially, a local assessment of individual income tax because it is incorrect. You can only request exoneration for current year returns that pertain to customers within your jurisdiction. Exonerations can also be requested by TAX.

When information is received by your office, the customer's correspondence and/or account information is reviewed to determine if a portion or all of the assessment should be exonerated. The Authorized Locality Representative must access the Exoneration Database to complete Exoneration Form 916 based on a review of the customer's account. Upon completion, Form 916 and any attachments must be sent to TAX for review.

TAX is responsible for reviewing the exoneration request and reviewing the customer's account in IRMS. Once the information has been reviewed by TAX, an Authorized TAX Representative creates the Lotus Notes Exoneration Entry and approves or denies the exoneration. TAX notifies the Local Treasurer's Office of the exoneration decision. It is your responsibility to communicate the result of the exoneration decision to the customer.

Tasks

[Create and Submit an Exoneration](#)

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